



# Standard Online IRESS ViewPoint

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## Table of Contents

|  |           |
|--|-----------|
| <b>Introduction</b> .....  | <b>3</b>  |
| <b>Using this guide</b> .....  | <b>3</b>  |
| <b>1.0 General navigation</b> .....  | <b>4</b>  |
| <b>1.1 Login</b> .....   | <b>4</b>  |
| <b>1.2 General navigation</b> .....  | <b>6</b>  |
| <b>1.3 Application menu</b> .....  | <b>7</b>  |
| <b>1.4 Important icons</b> .....   | <b>8</b>  |
| <b>1.5 Broadcasting</b> .....  | <b>9</b>  |
| <b>1.6 Keyboard shortcuts</b> .....  | <b>10</b> |
| <b>1.7 Drag and drop codes</b> .....                                       | <b>10</b> |
| <b>2.0 Create worksheets</b> .....   | <b>11</b> |
| <b>2.1 Create a new worksheet</b> .....                                    | <b>11</b> |
| <b>2.2.1 Rename a worksheet</b> .....                                      | <b>11</b> |
| <b>2.2.2 Delete a worksheet</b> .....                                      | <b>11</b> |
| <b>2.2 Customise a worksheet layout</b> .....                              | <b>11</b> |
| <b>3.0 Building a workspace</b> .....                                      | <b>12</b> |
| <b>3.1 Divide a new worksheet in multiple widget spaces</b> .....          | <b>12</b> |
| <b>3.2 Divide an existing widget space in multiple widget spaces</b> ..... | <b>13</b> |
| <b>3.3 Adding a widget</b> .....   | <b>14</b> |
| <b>3.4 Worksheet template</b> .....  | <b>18</b> |
| <b>3.5 How to search</b> .....   | <b>19</b> |
| <b>3.6 How to save</b> .....   | <b>20</b> |
| <b>4.0 Configuration</b> .....   | <b>21</b> |
| <b>4.0 Add and remove columns</b> .....                                    | <b>21</b> |

## Introduction






Standard Online IRESS ViewPoint is an intuitive, easy-to-use market data and trading platform built on HTML5 technology.

It offers highly customisable user interface, a comprehensive library of widgets, and the ability to log in via the latest versions of all major web browsers with no dependencies on 3<sup>rd</sup> party plug-ins.

The purpose of this document is to provide a basic introduction on how to customise and navigate. For more detailed information on the platform, access the Help Centre.

## Using this guide

This guide is structured to be as easy to follow as possible. To help you navigate through this guide, a number of symbols are used to help identify key points or sections.

| Icons   | Description                                      |
|---|--|
|    | Important - prioritise these sections            |
|  | Extra Information - background details           |
|  | Useful hints or tips                             |
|  | Points to an important menu item                 |
|  | Highlights column headings for ease of reference |

# 1. General navigation

## 1.1 Login

1. Single sign on from the Standard Bank OST website:

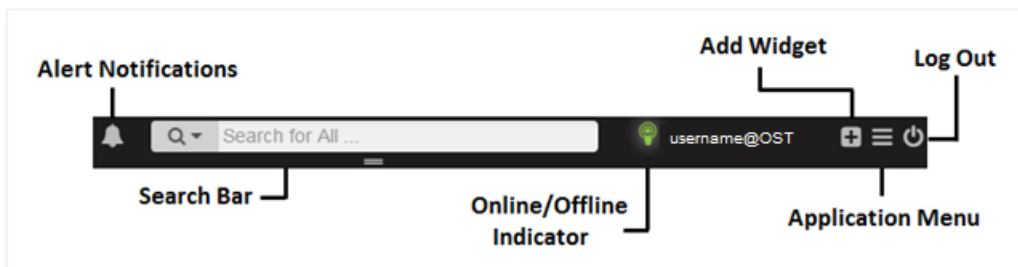
[www.equities.co.za](http://www.equities.co.za)

Once you enter the ViewPoint platform, you will automatically be routed to a landing page, also referred to as your default layout. This can be customised to suit your requirements.

## 1.2 General navigation

ViewPoint interface has the following in the application menu bar

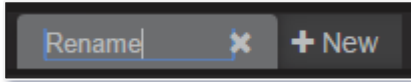
- **Alert Notification:** set and view alert notifications to trigger in response to specific conditions.
- **Search Bar:** either do a basic search, or search by a specific category.
- **Online / Offline Indicator:** the Online/Offline indicator shows whether you are logged in or logged out.
- **Add Widget:** open the Add Widget dialog box to add a new widget to the workspace layout.
- **Application Menu:** clicking on the application menu button displays a range of options related to your widget, worksheets, alerts and overall layout.
- **Logout:** always log out of the application to ensure your login data is correctly cleared from the server.



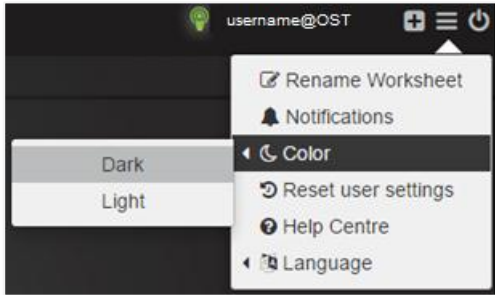
### 1.3 Application menu

Clicking the application menu button displays a range of options related to your widgets, worksheets, alerts, and overall layout:

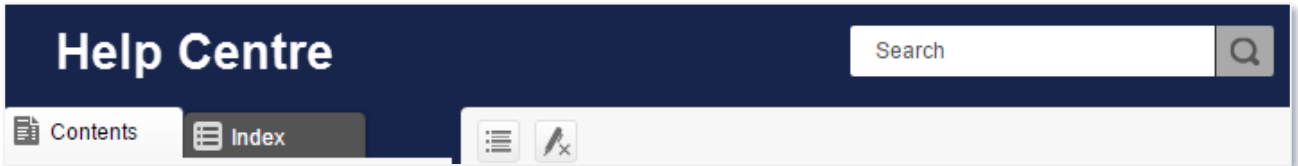
- **Rename Worksheet:** changes the name of the worksheet











- **Notifications:** configure alert notifications
- **Colour:** select light theme / dark theme colour scheme



- **Reset:** reset layout to upload templates with the default settings
- **Help Centre:** launch the Help Centre




## 1.4 Important icons

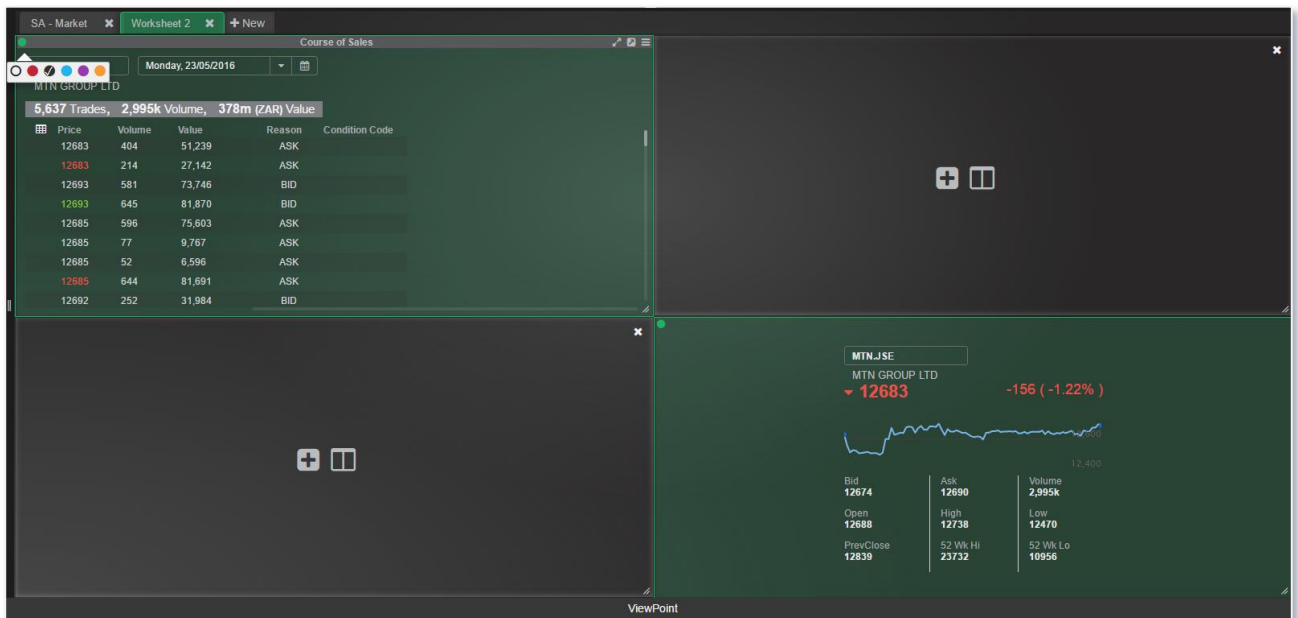
| Icon  | Function  |
|---|---|
|    | <p>Click the <b>widget</b> menu on the top right-hand corner of any widget to display a drop down list of widget actions:</p> <ul style="list-style-type: none"> <li>• <b>Add Widget:</b> open the <b>Add Widget</b> dialog box to add a new widget to a worksheet</li> <li>• <b>Detach Widget:</b> open the widget in a new browser window on top of the workspace</li> <li>• <b>Maximize Widget:</b> maximise widget on top of the workspace</li> <li>• <b>Replace Widget:</b> replace a widget with a different one</li> <li>• <b>Remove Widget:</b> remove widget from its widget frame</li> <li>• <b>Divide Widget:</b> divide the worksheet into frames i.e. 2x2 or 4x4</li> <li>• <b>Help Centre:</b> display the relevant Help Centre topic for the widget</li> </ul> |
|    | <p>Click the <b>broadcast</b> icon on the top left had corner of any widget to apply selected security information across widgets</p> <ol style="list-style-type: none"> <li>1. In the relevant widget, select broadcast and a row of coloured circles appear.</li> <li>2. Select a coloured circle to represent the widgets that will comprise the broadcast group i.e. </li> <li>3. Repeat steps 1 – 2 for each widget included within the broadcast group.</li> <li>4. All widgets in the selected broadcast group (i.e. red) displays in the chosen colour</li> </ol>  |
|  | <p>Click the <b>inline action</b> menu in certain widgets to display menu options specific to that widget i.e. <b>remove</b> a quote form a Watchlist or broadcast a security code to other widgets.</p>  |
|  | <p>Click the <b>configure</b> menu in the left hand corner of the heading row of the Watchlist widget.</p>  |
|  | <p>Indicates that there is news linked to the security.</p>   |
|  | <p><b>Relevancy</b> icon provides information on securities that are held in a portfolio or any open orders that are in the market.</p>   |
|  | <p>Set <b>alert notifications</b> to trigger in response to specific conditions.</p>  |

## 1.5 Broadcasting

The Broadcast function displays data for a selected code in widgets that accept a single security code as input criteria. Assign colours to widgets to broadcast information. For example, you can broadcast a security code from a Quote widget into a chart and depth widget simultaneously. Each widget that is assigned the same colour is part of the same broadcast group.

Broadcast a security to multiple widgets

1. In the widget that you want to broadcast from, click  icon in the top left hand corner of the widget.
2. Choose a coloured circle to represent the widgets that will comprise the broadcast group.
3. Repeat steps 1 and 2 for each widget for the broadcast group.



Hovering over the colour will display which widgets are in the same broadcast group.

## 1.6 Keyboard shortcuts

| Keyboard Shortcut                | Function   |
|----------------------------------|--|
| <b>Alt + F5</b>                  | Broadcast the security code in the selected widget to all of the widgets in the broadcast group. |
| <b>Alt + Shift + A</b>           | Open the Add Widget dialog box.  |
| <b>Alt + Shift + F11</b>         | Maximize the selected widget.  |
| <b>Alt + Shift + F12</b>         | Detach the selected widget.  |
| <b>Alt + Shift + Up arrow</b>    | Select the widget above the currently selected widget.   |
| <b>Alt + Shift + Down arrow</b>  | Select the widget below the currently selected widget.   |
| <b>Alt + Shift + Right arrow</b> | Select the widget to the right of the currently selected widget.                                 |
| <b>Alt + Shift + Left arrow</b>  | Select the widget to the left of the currently selected widget.                                  |
| <b>Alt + N</b>                   | Create a new worksheet.  |
| <b>Alt + PgDown</b>              | Jump to the next worksheet tab.  |
| <b>Alt + PgUp</b>                | Jump to the previous worksheet tab.  |

## 1.7 Drag and drop codes

Drag a security code from one widget to another, and the widget automatically updates to display relevant information for that security.

### To drag and drop a security code

1. Hover the cursor over the security code.
2. A black arrow displays to the right of the cursor.
3. Drag the cursor to the relevant widget, which displays in a green dashed line to indicate that the security code will be dropped there.
4. Release the mouse button and the widget will update with the new security code.



Drag and Drop only applies to widgets that have a Code box i.e. Quote, Watchlist, and News etc.



## 2. Create worksheets

Worksheets consist of specific widgets that can be displayed in different ways to suit different requirements. Create different worksheets for different purposes.

### 2.1 Create a new worksheet

1. In the row of worksheet tabs within the application menu bar click **New**.



2. A new worksheet tab displays at the end of the row.

#### 2.2.1 Name a worksheet

1. Double click on the worksheet tab and type in a new name i.e. **Watchlist**



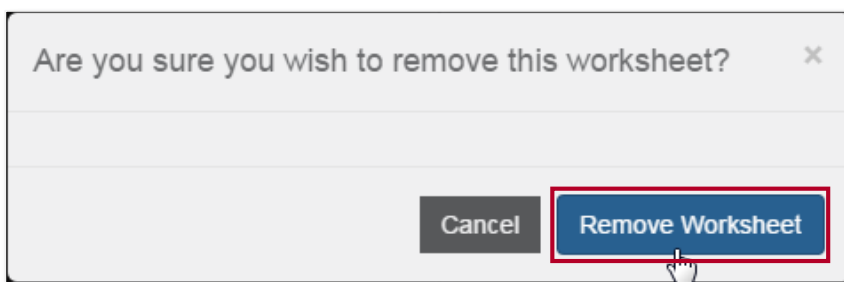
2. Click **enter**.

#### 2.2.2 Delete a worksheet

1. Click the close button in the worksheet tab.



2. Click **Remove Worksheet**.



### 2.2 Customize a worksheet layout

Customise worksheet layout in any of the following ways:

- Use a pre-defined template to automatically populate your worksheet with specific widgets.
- Use the widget library to manually add specific widgets.
- Divide your screen into various widget spaces, and then manually add widget for each widget space.

### 3. Building a workspace

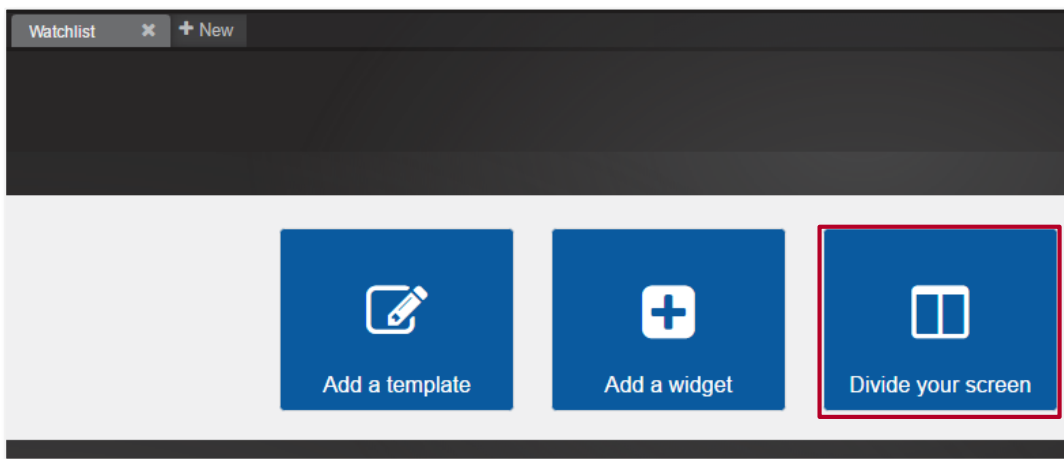
Widgets are specific tools for use to perform tasks within the application. Widget spaces are placeholders for these widgets.

Divide the worksheet or screen into various widget spaces by:

- Dividing a new worksheet into multiple widget spaces
- Dividing an existing widget space into multiple widget spaces

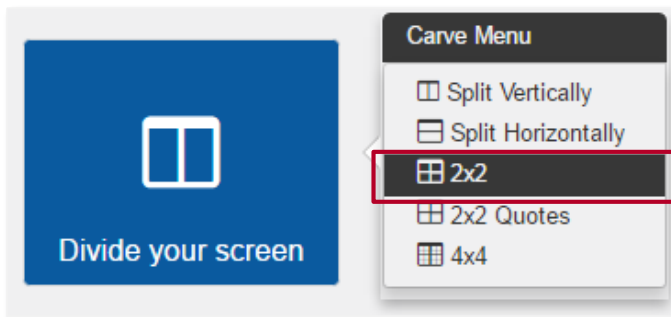
#### 3.1 Divide a new worksheet into multiple widget spaces

1. Within the new worksheet tab, click the **Divide your screen** button.



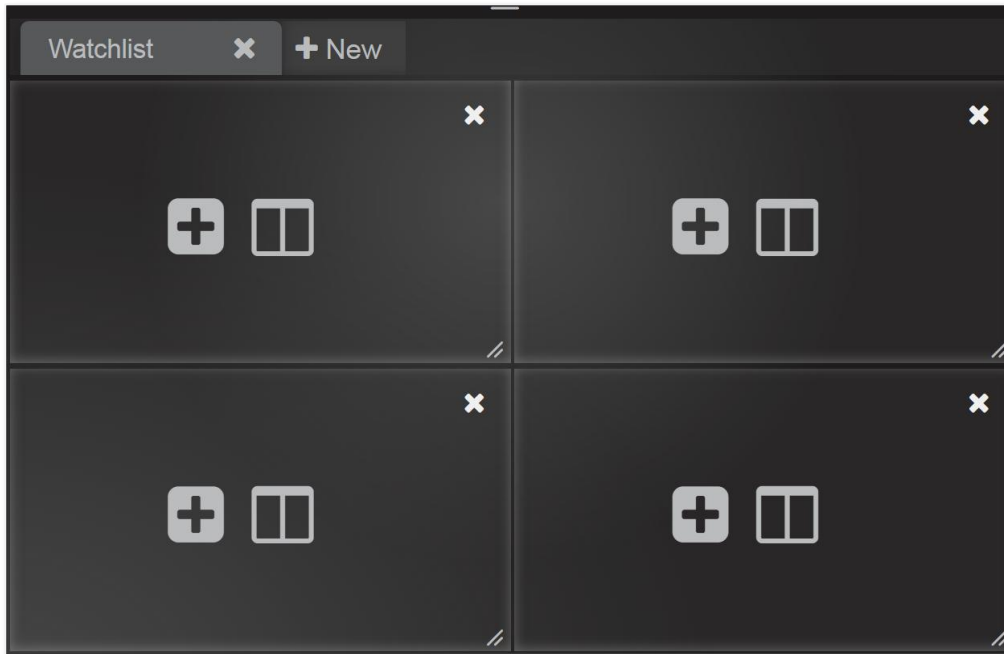
2. The **Carve menu** displays:

- **Split Vertically**: divide the screen into two vertical widget spaces
- **Split Horizontally**: divide the screen into two horizontal widget spaces
- **2x2**: divide the screen into four widget spaces, **two across and two high**
- **2x2 Quotes**: divide the screen into four widget spaces, two across and two high, and populate each widget space with the Quote widget
- **4x4**: divide the screen into eight widget spaces, four across and four high



The Quote widget displays dynamic pricing information quotes on securities, indices and currencies.

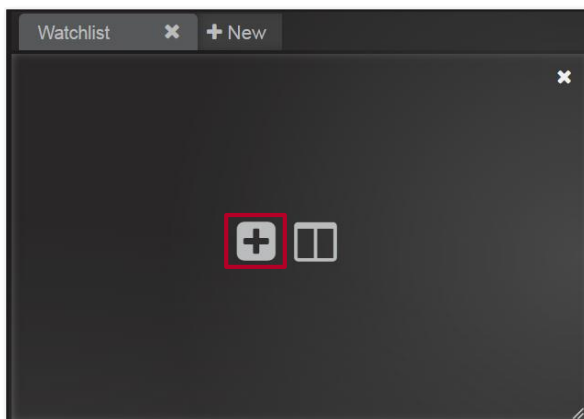
3. The new worksheet is split into the selected number of widget spaces (i.e. 2x2). Divide it even further into multiple widget spaces. This is possible for both empty widget spaces or for widget spaces that already contain a widget.



### 3.2 Divide an existing widget space into multiple widget spaces

#### For empty widget spaces

1. In the empty widget space, click the **Carve Menu** button.



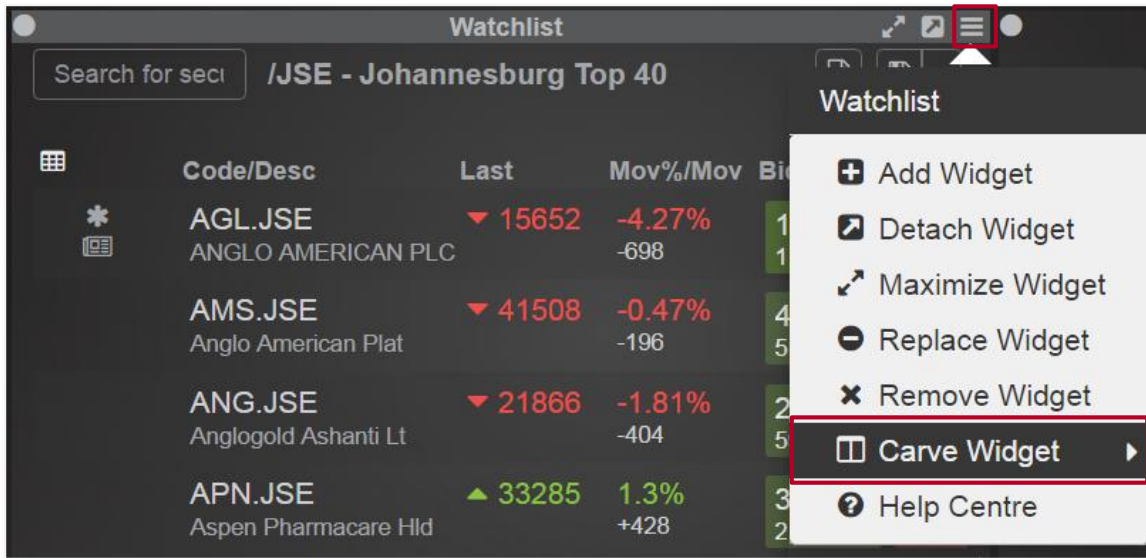
2. The **Carve menu** displays > Select relevant split (as detailed above).
3. The empty widget space is split into the selected number of widget spaces. Individually add widgets to these widget spaces.



Refer to **Add a Widget from the Widget Library**.

**For widget, spaces that already contain a widget**

1. In a widget space that already contains a widget, click the **Widget Menu** button.
2. Select **Carve Widget**. The **Carve Menu** displays > Select relevant split (as detailed above).



3. The widget space is split into the selected number of widget spaces, with the existing widget moving to the top right.

**3.3 Adding a widget**

Widgets are tools to perform essential tasks like viewing market data and analysing specific types of information. Choose from an extensive library of widgets to populate a worksheet.

Widgets display in “widget spaces” in the worksheet. Control widget spaces by dynamically resizing or dividing into smaller widget spaces.

Add widgets to a widget space in the worksheet from the following places:

- From a new worksheet
- From a blank widget space
- From the widget menu

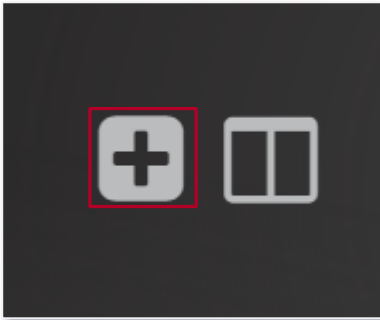
**Add widget from a new worksheet**

1. In a new worksheet, click the Add a widget button.

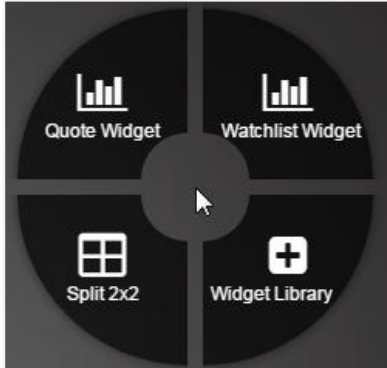


### From a blank widget space

1. Click the **+** button.

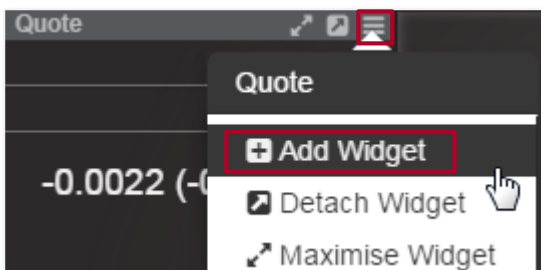


2. To add one of the four most commonly used widgets, click and hold the mouse button to display a wheel containing these widgets. Then select the relevant widget.



### Add widget from the widget menu

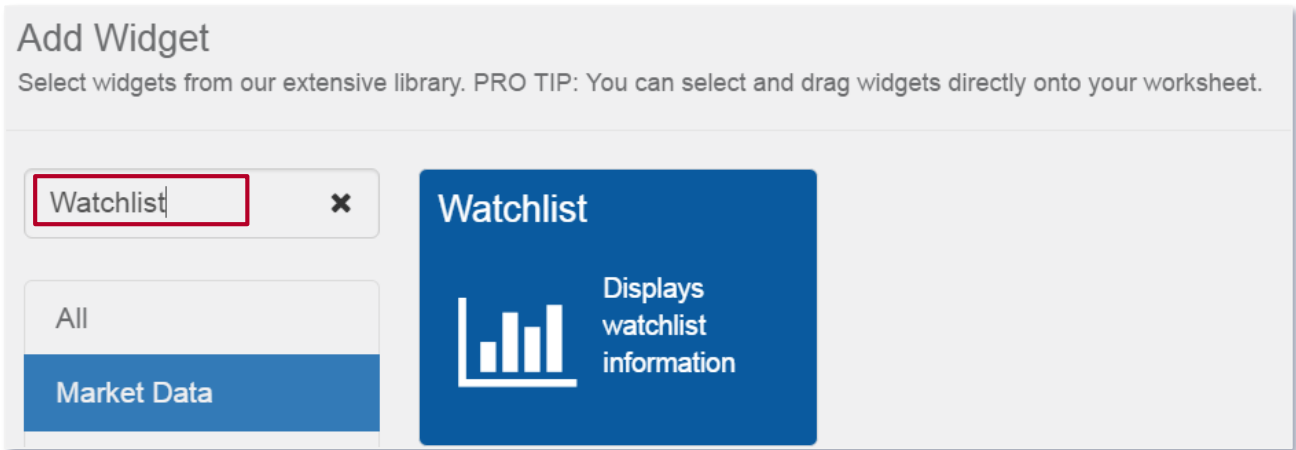
1. Click the widget menu and select **Add Widget**.



2. On the **Select Widget** (or **Add Widget**) dialog box, select one of the following:

### Search for a specific widget

Start typing the name of the widget i.e. **Watchlist** into the **Search** bar on the left hand side of the dialog box. Widgets matching the search criteria display on the right hand side.



### Browse for a widget based on category

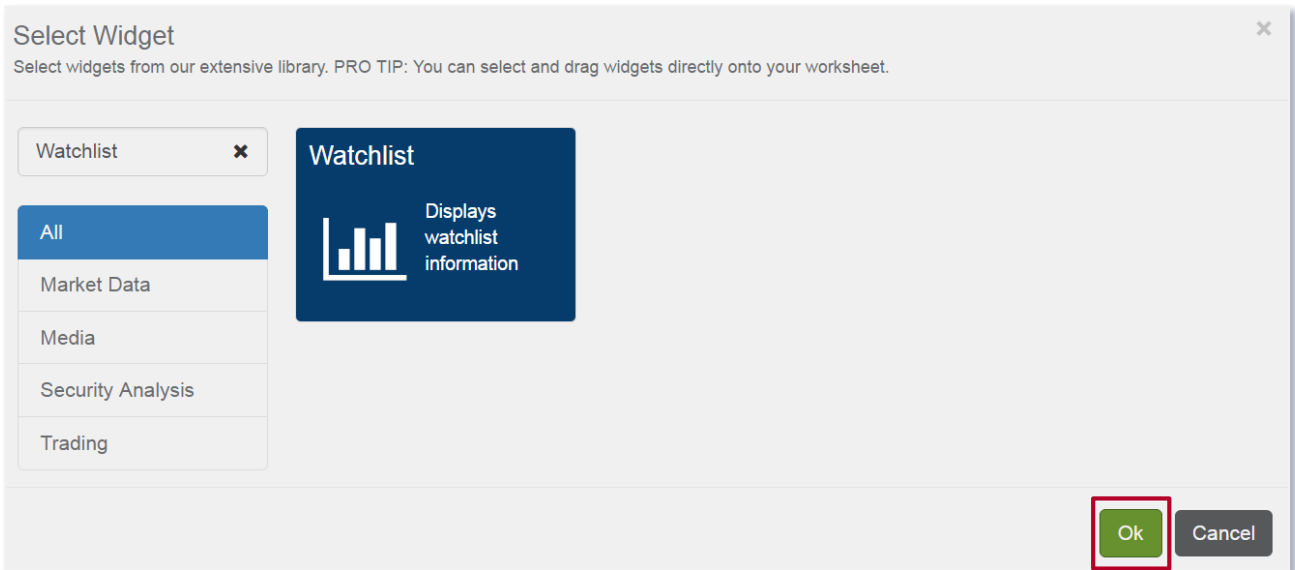
Click through the widget categories on the left hand side of the dialog box to view the widgets in each category. Alternatively click **All** to view all available widgets.



3. Add the widget to the workspace by doing one of the following:

#### Via mouse click

Click the tile of the applicable widget i.e. Watchlist and click OK (bottom right). Alternatively double click on applicable widget tile.



### Via drag and drop

Drag and drop the widget into the applicable widget space in the worksheet. A green dashed line will display around the widget space to indicate where the dropped widget will display.



It is possible to add multiple widgets within a widget space, like stacking widgets on top of each other in the same window.

1. Add a widget i.e. Watchlist to a widget space.
2. Within the same widget space click on the Widget menu and select add widget.
3. Select applicable widget i.e. another Watchlist

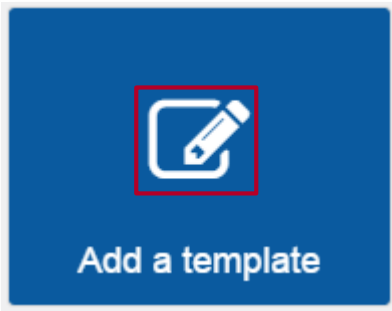


### 3.4 Worksheet template

When adding a new worksheet, a ready-made worksheet template is available to use to save time. Templates are pre-defined with specific widgets depending on the “theme” of the template (for example select a template intended specifically for viewing local market data).

#### To select a template

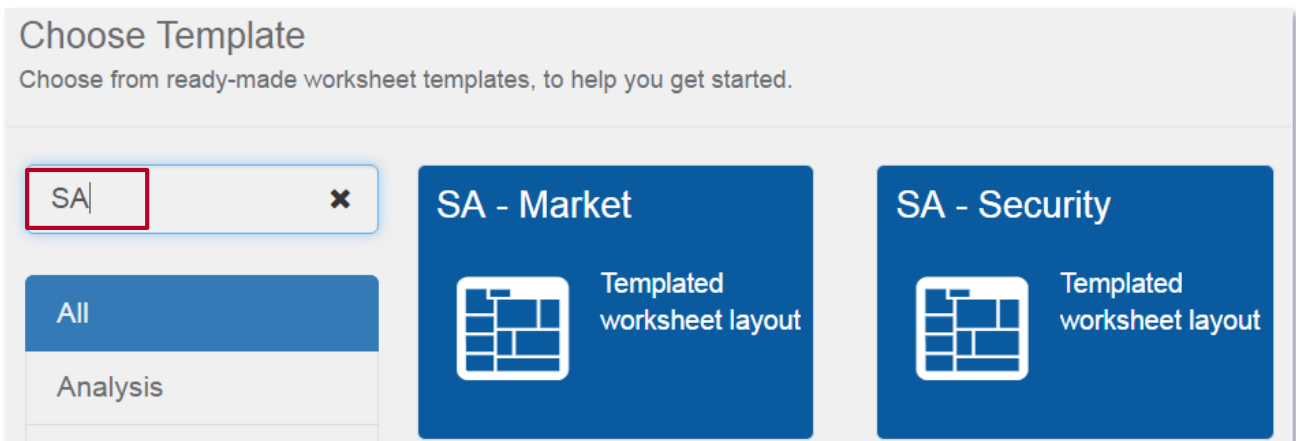
1. Click the Add a template button. The **Choose Template** dialog box displays.



2. Do one of the following:

#### Search for a specific template

Start typing the name of the required template i.e. **SA** into the **Search** bar on the left hand side of the dialog box. Templates matching the search criteria display on the right hand side.

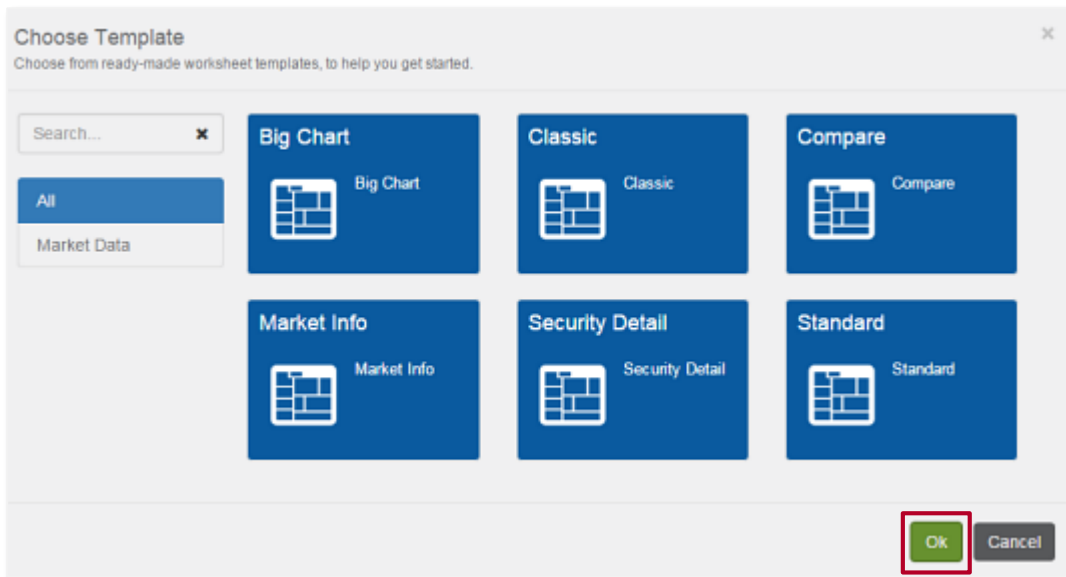


#### Browse for a template based on category

Click through the template categories on the right hand side of the dialogue box to view templates in each category (**Market Data**, **Analysis**, etc.). Alternatively click **All** to view all the available templates.

3. Click the button for the applicable template.





4. Click **OK**. The template is applied to the worksheet.



Please note the aforementioned templates are examples. Templates are set and designed by brokers.

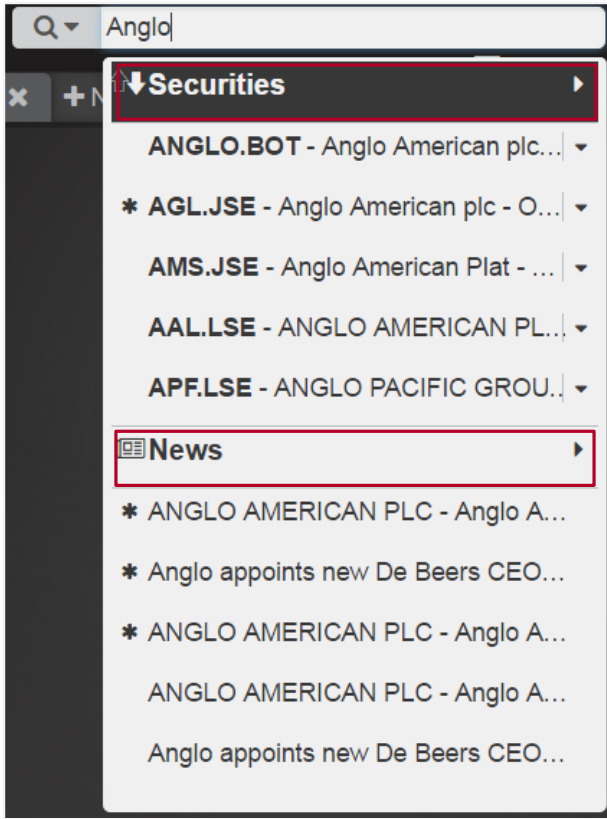
### 3.5 How to search

Use the search bar in the application menu (at the top of the screen) to search for any of the following:

- Securities
- Watchlists
- News headlines
- Layout elements i.e. widget names, template names
- Positions
- Orders

#### Basic Search

1. Start typing in the search bar, and the application will display suggested search results for all categories i.e. News articles, Securities.
2. Click on the category to expand your result.

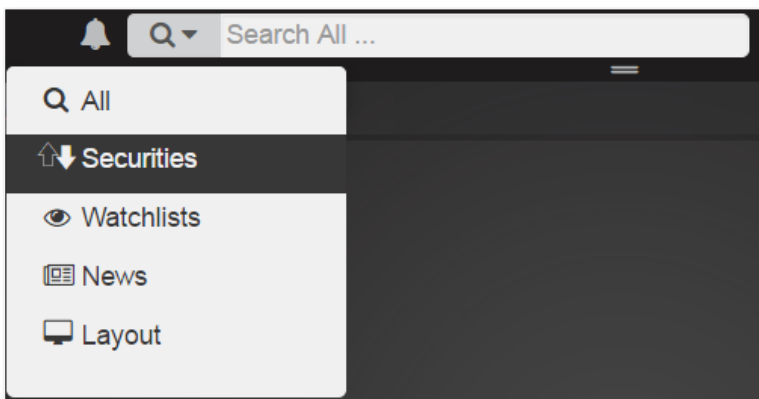


### Search by specific category

1. Click the search icon to drop down a list of categories.



2. Select the relevant category.
3. Start typing in the search bar and the application will display suggested search results for that category.



### 3.6 How to save the layout

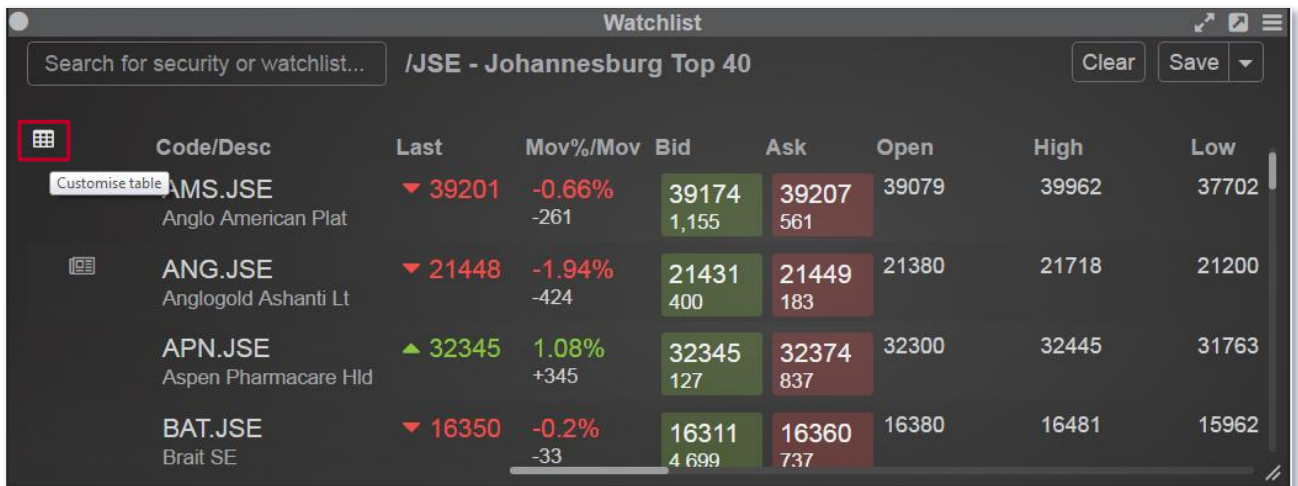
IRESS ViewPoint automatically saves your layout when you log out of the platform

## 4. Configuration

### 4.1 Add and remove columns

With certain widgets configuration is an option i.e. Watchlist widget.

1. Click the configuration menu on the left hand corner of the heading row for the list of securities. The Configuration Table dialog box displays.

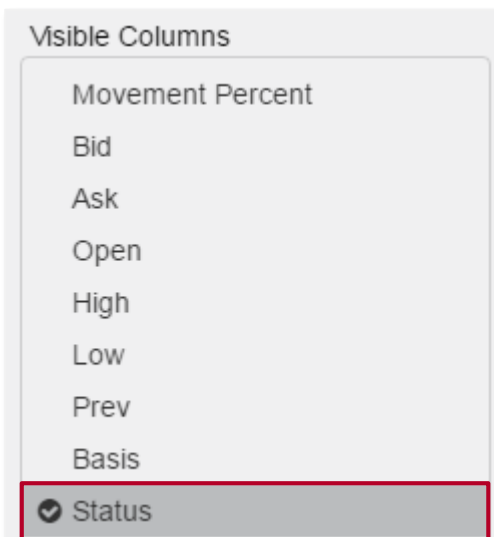


| Code/Desc                       | Last    | Mov%/Mov       | Bid            | Ask          | Open  | High  | Low   |
|---------------------------------|---------|----------------|----------------|--------------|-------|-------|-------|
| AMS.JSE<br>Anglo American Plat  | ▼ 39201 | -0.66%<br>-261 | 39174<br>1,155 | 39207<br>561 | 39079 | 39962 | 37702 |
| ANG.JSE<br>Anglogold Ashanti Lt | ▼ 21448 | -1.94%<br>-424 | 21431<br>400   | 21449<br>183 | 21380 | 21718 | 21200 |
| APN.JSE<br>Aspen Pharmacare Hld | ▲ 32345 | 1.08%<br>+345  | 32345<br>127   | 32374<br>837 | 32300 | 32445 | 31763 |
| BAT.JSE<br>Brait SE             | ▼ 16350 | -0.2%<br>-33   | 16311<br>4 699 | 16360<br>737 | 16380 | 16481 | 15962 |

2. Do one of the following:

#### Hide Visible Columns

- i. In the **Visible Columns** section, select the columns that are to be hidden i.e. **Status**. A checkmark displays on the left hand side of the column, indicating it has been selected.



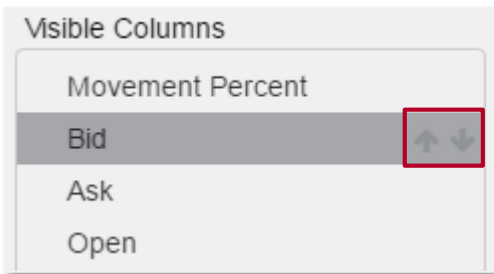
- ii. Click **Hide**. The columns move to the Hidden Columns section, and will no longer display in the Watchlist widget.



- iii. To show hidden columns apply the same process, clicking on **Show**.

### Change the Order of Columns

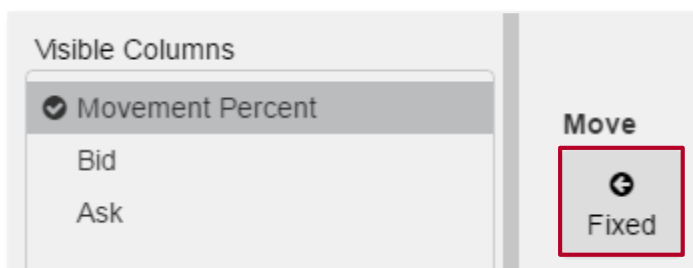
To change the order in which the columns display, select column names and click up or down arrows until the order is correct.



### Set Fixed Columns

Set specific columns as fixed to keep them visible while scrolling.

- i. Select the column name i.e. Movement Percent
- ii. Click Fixed



### Reset the Columns to the Default Display

To reset the columns back to default display, click **Reset Columns**.

- 3. Click **Save Changes**.

